



# MULTI-CHANNEL BUSINESS SOFTWARE

Contact  
Management



e-commerce  
solutions



Full ERP / CRM

# CALL CENTRE MANAGER

PRIAM

# Introduction

“A new generation of contact management software to manage both sales prospecting and servicing existing customers.”

Call Centre Manager is the only fully featured, enterprise level CRM package to incorporate:

- Fully featured contact management system
- Automated customer services
- Integrated call scripting
- Business process mapping and workflow automation
- Fully integrated with a multi-channel business system

Importantly, this is an Enterprise Level solution with no limits on the number of simultaneous users or transaction volumes.

Call Centre Manager provides a single repository for all customer information across the entire organisation.

# Overview

Call Centre Manager is the only fully featured, enterprise level CRM package to incorporate:

## Contact Management

- Prospects or Customers, B2B/B2C
- Intelligent searching
- Nested database e.g. company with contacts, with branches who have contacts etc
- Full audit trail of all customer events
- Letter templates, email client

## Automated Customer Services

- Automated definable actions
- Customer services interface to actions
- Triggers from ERP to actions
- Escalations and authorisations
- Comprehensive reporting on all customer events

## Integrated Call Scripting

- User definable scripting
- Browser based
- Telephony integration
- Full integration to back office business system

## Workflow Management

- Workflow management
- Business process mapping

## Full ERP Business System

- Fully integrated multi-channel business system
- Marketing, order processing, stock, financials
- E-commerce and content management
- Credit card handling
- Quick addressing
- Integrated courier links

PRIAM

# Contact Management

## Client Details

The screenshot displays the 'Contact Manager' software interface. The window title is 'Contact Manager - [Displaying Company] - Priam Software'. The main form is titled 'Basic Details' and contains the following information:

- Account Type:** Customer/Supplier (with a pencil icon for editing). Short Name: PRIAM.
- Individual/Company:** Individual (unselected), Company (selected). **Customer/Supplier:** Customer (selected), Supplier (selected). A 'Customer Processing' button is visible.
- Company Name:** Priam Software.
- Primary Contact:** Glyn Carvill - 01788 558000.
- Account:** 3. **Created:** 01 November 1994.
- Navigation:** Basic Details (selected), Contacts, Links, Branches, Additional, Letters \*, Documents, Notes \*, E-Mails, Tasks \*, Current Task, Events, CRM.
- Basic Details Fields:**
  - Postcode: CV21 2SA
  - Address 1: The Old Telephone Exchange
  - Address 2: 32-42 Albert St
  - Address 3: (empty)
  - Town: Rugby
  - County: Warks
  - Country: UNITED KINGDOM
  - Area: Midlands
  - Source: U (Unspecified)
  - Phone: 01788 558000
  - Ext: (empty)
  - Mobile: 077392 16152
  - Fax: 01788 558001
  - E-Mail: sales@priamsoftware.com
  - Website: www.priamsoftware.com
  - Account Type: Software House
- Comments:** This area is for user comments.
- Buttons:** Print, Ok, Cancel, Apply.

- Records name and address detail, with full integration with quick addressing software and de-duplication functionality
- Provides user definable fields for contact details to record telephone, fax, mobile phone, email address, web address and other details
- Area defined either geographically or by for example industry sector
- Account type e.g. major account, education sector (again all definable)
- Allows for multiple contracts for the head office
- Allows for multiple branches and within each branch multiple contacts

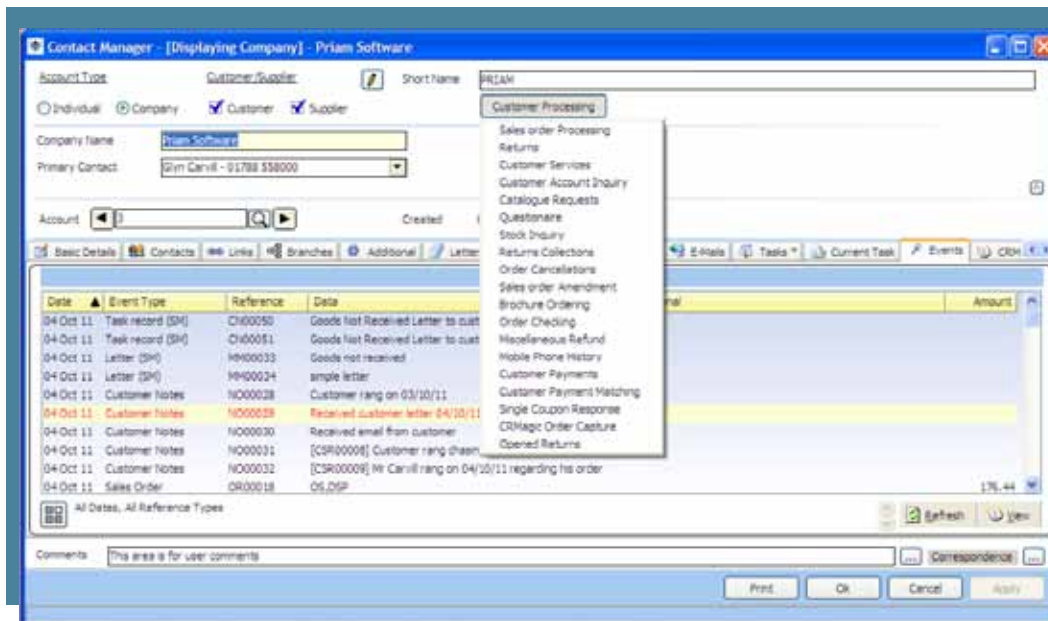
# Contact Management

## Customer Processing and Events

Customer processing and events provide the customer service agent with a complete picture / audit trail of the client's details and history.

Events allow the agent to drill down into the PRIAM database to display all transactions relating to a client.

Customer processing provides access to all of the transaction processing screens contained with the PRIAM ERP system.



The events window displays all of the dealings that have taken place against a customer record.

Examples of events are any type of transaction that occurs against the customer record. This includes:

- When the record was first created
- When a letter or email has been sent
- When a document or note has been added
- Details (drill down) of sales orders, despatches or sales invoices

Customer processing allows the operator to open any of the transactional based processing screens available within the PRIAM ERP system. This includes Scripting, Order Processing, Returns Processing, Catalogue Requests and many more. Access to these screens can be controlled and restricted by user or user group.

# Contact Management

## Contacts

Call Centre Manager allows you to create an unlimited number of contact records or to link existing contact records into the current company. One contact can belong to multiple companies / individuals.

The screenshot shows the 'Contact Manager' window for 'Priam Software'. The account type is 'Customer/Supplier' with a short name of 'PRIAM'. The company name is 'Priam Software' and the primary contact is 'Glyn Carvill - 01788 558000'. The account was created on 01 November 1994. The 'Contacts' tab is active, displaying a table with the following data:

Account	Name	Position	Salutation	Phone	Extension
14	Mr Glyn Carvill	Commercial Director	Mr Carvill	01788 558000	
15	Ms Christine McKimmie	Finance Director	Ms McKimmie	01788 558000	
29	Mr Steve Glaze	Head of programming	Mr Glaze	01788 558000	

The interface includes a toolbar with options like 'Add Existing', 'Add New', 'Open', 'Delete', 'Move', and 'Letter'. A comments field at the bottom contains the text 'This area is for user comments'.

Allows you to capture:

- User definable additional details and profiles
- Single shot or template letters
- Multiple documents to be stored in a single area
- Comprehensive free format notes
- Single shot or template emails
- Create tasks automatically or manually and assign goals and results
- Events - links to the PRIAM back office system

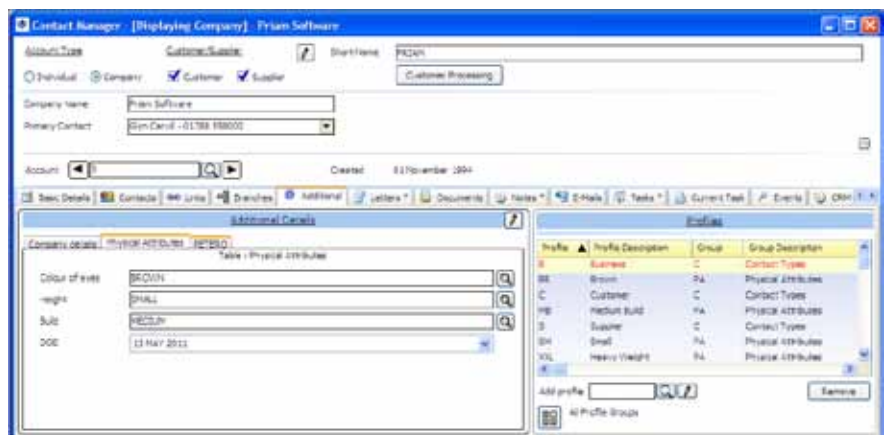
# Contact Management

## Additional Details

Call Centre Manager allows you to create and maintain your own tables and data fields within those tables.

Each table can contain as many data fields as you want and these can allow for multiple predefined responses e.g. area of business above. Behind each response is a profile that is added to the contact detail so the detail is not just memo. The database can now be segmented by the profile added from the response so the mailing program can select all retail customers for example.

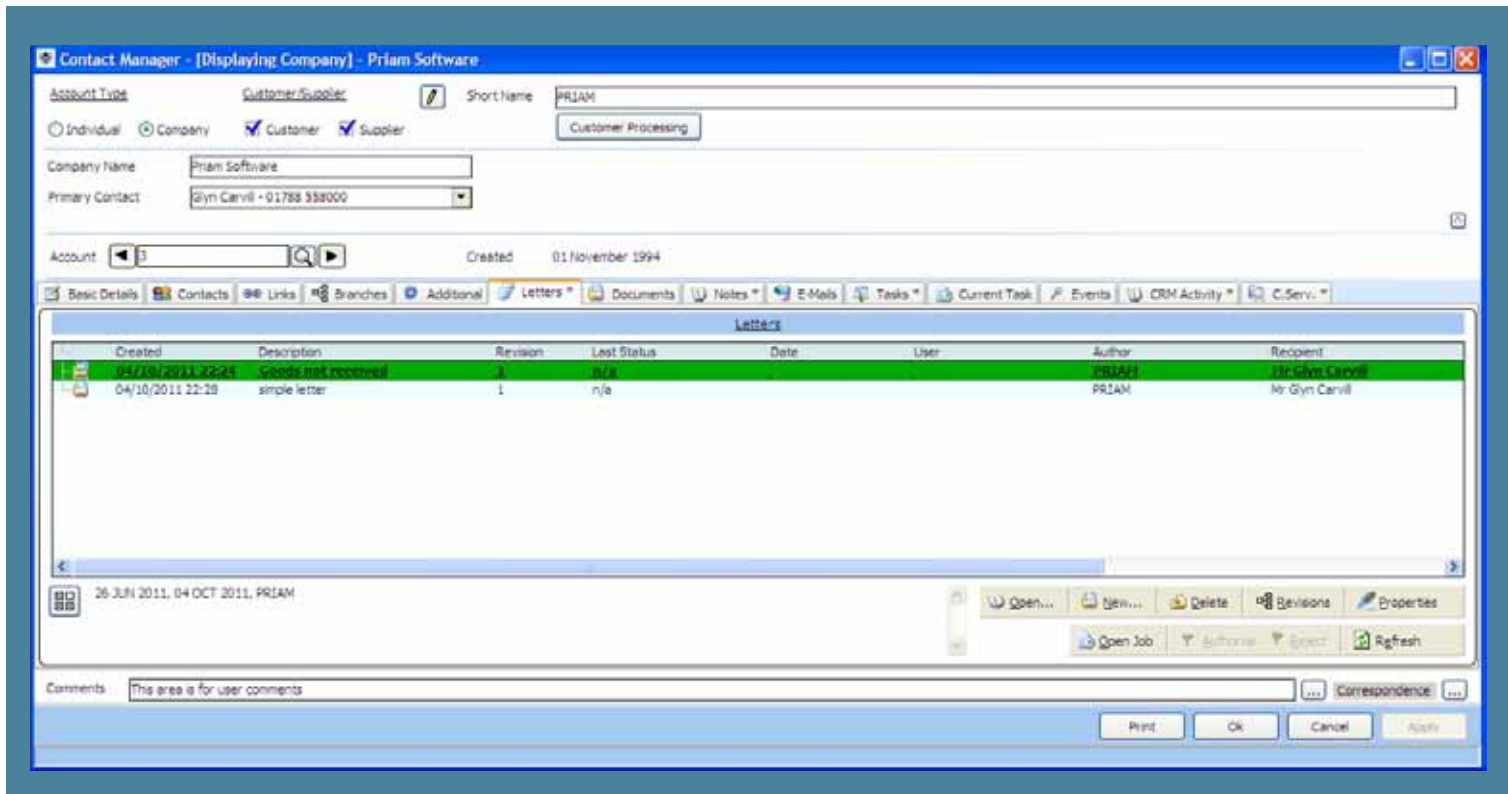
It is also possible to have view only fields which are calculations based on the back-office database record for the contact e.g. order value divided by orders over time. This is achieved through a calculator that references all of the ERP database!



# Contact Management

## Letters and Emails

Call Centre Manager allows you to automate the process of creating and maintaining, receiving and sending letters and emails.



Letters and emails can be created on an ad-hoc basis or via existing templates.

Templates are created using the template editor or imported from existing documents.

The PRIAM database can be accessed to mail merge any existing data into single shot or template letters.

Pool your incoming emails and allocate them to customer service operators or groups.

Links to any email server.

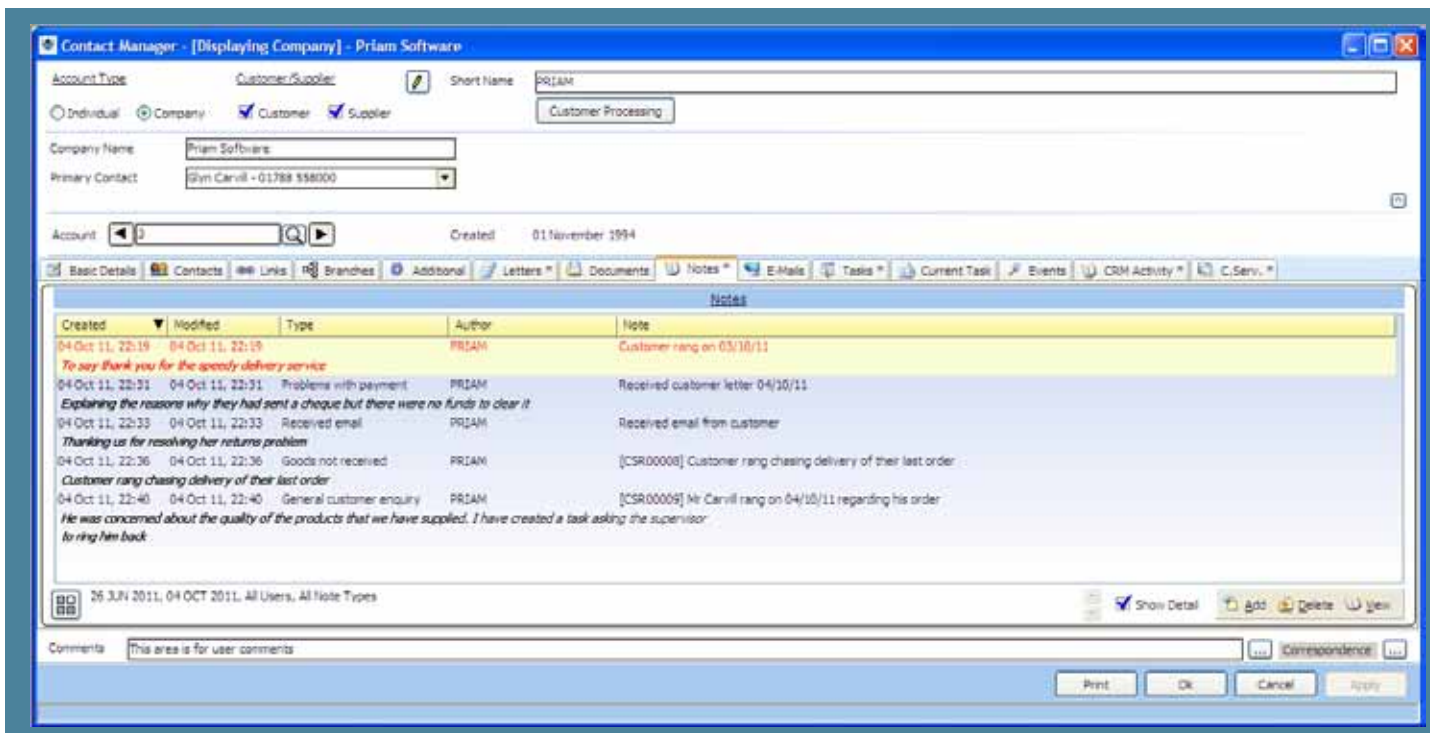


# Contact Management

## Documents and Notes

Call Centre Manager allows you to create and record comprehensive notes for each customer interaction:

- Create an unlimited number of customer notes
- Different types of notes can be created by the user for example complaint, query or customer service
- Notes can be filtered according to the type, date created or author



Call Centre Manager will store and retrieve any type of document in a single, easily accessible area.

Different document types can be stored, for example Word, PDF, Excel spreadsheet, JPG.

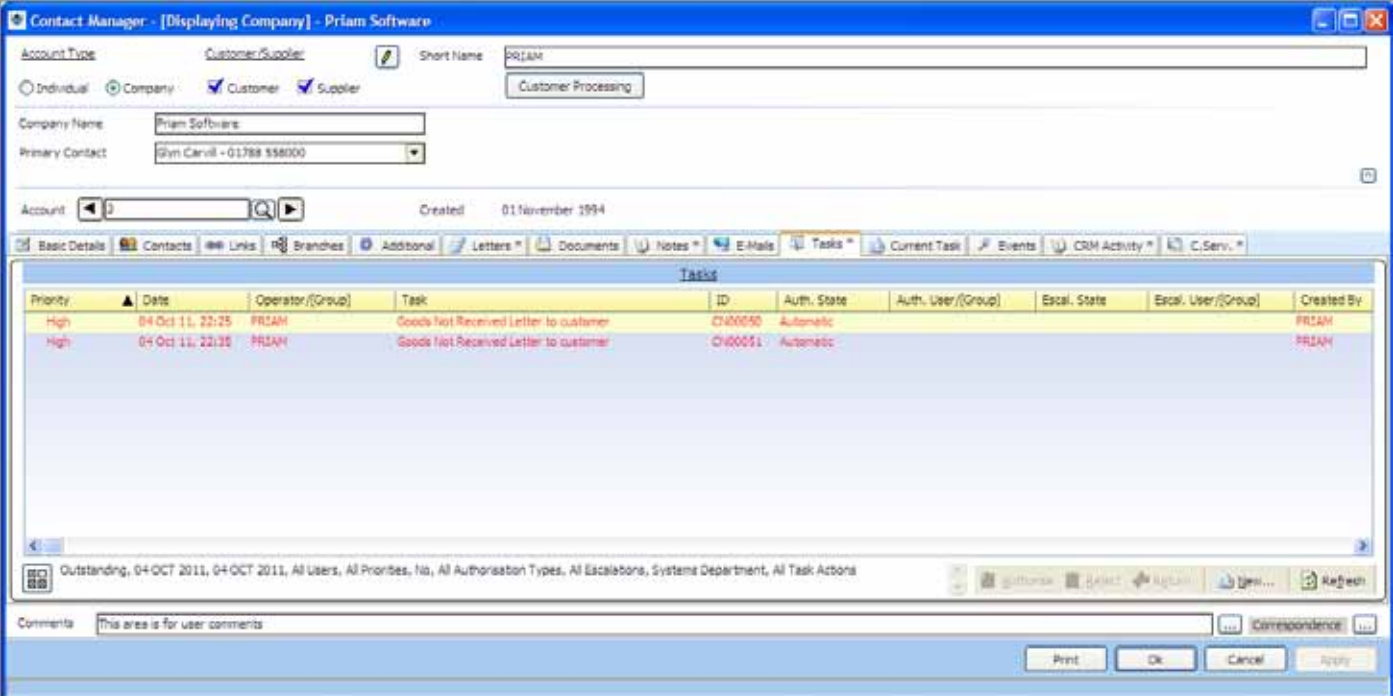
Documents can be filtered and viewed by date, author or whether they are incoming or outgoing.

# Automated Customer Services

The Customer Services Editor allows operators to create and record customer service events or amend existing ones.

## Automated Customer Services

- Automate definable actions
- Create tasks for individual or groups with goals and results
- Define triggers from within ERP to create user tasks
- Full customer services functionality interfaced to task creation
- Create escalations and authorisations
- Attrition rate reporting
- Customer services centred on customer or shop / location



The screenshot displays the 'Contact Manager' software interface. The window title is 'Contact Manager - [Displaying Company] - Priam Software'. The interface includes a top navigation bar with tabs for 'Basic Details', 'Contacts', 'Links', 'Branches', 'Additional', 'Letters', 'Documents', 'Notes', 'E-Mails', 'Tasks', 'Current Task', 'Events', 'CRM Activity', and 'C.Serv.'. The 'Tasks' tab is active, showing a table of tasks. The table has columns for Priority, Date, Operator/(Group), Task, ID, Auth. State, Auth. User/(Group), Escal. State, Escal. User/(Group), and Created By. Two tasks are listed, both with a priority of 'High' and a date of '04 Oct 11, 22:25'. The tasks are 'Goods Not Received Letter to customer' and 'Goods Not Received Letter to customer', both created by 'PRIAM'. The interface also includes a search bar, a 'Created' date of '01 November 1994', and a 'Comments' section at the bottom.

Priority	Date	Operator/(Group)	Task	ID	Auth. State	Auth. User/(Group)	Escal. State	Escal. User/(Group)	Created By
High	04 Oct 11, 22:25	PRIAM	Goods Not Received Letter to customer	CH00050	Automatic				PRIAM
High	04 Oct 11, 22:25	PRIAM	Goods Not Received Letter to customer	CH00051	Automatic				PRIAM

# Automated Customer Services

## Customer Services Editor

A unique call reference number is allocated to every call. Each call is treated as a unique event with an associated audit trail which provides the basis of reporting and analysis.

A customer services event can be created against an existing customer record or against an anonymous account. For example the service call might be to enquire on shop opening times and customer details need not be recorded.



The Customer Services Editor allows you to record:

- The original source of the call i.e. phone, email or letter
- The status of the call i.e. pending, urgent, closed etc
- The nature of the customer service event and a sub reason. For example if the reason for the call is a customer complaint this may be analysed as a sub reason of product malfunction, incorrect goods or late delivery
- The customer details or if an anonymous account
- Record sales orders, product information, store details or notes without having to move from the primary screen
- Access user definable knowledge base

# Automated Customer Services

## Time Tracking - Customer Services History

Call Centre Manager gives an activity breakdown for every customer service event. This provides the audit trail for a customer service event and the basis of reporting and analysis.

The screenshot shows the 'Customer Services Editor' window. At the top, there's a title bar and a header area with the text 'Customer Services Editor' and a sub-header 'Customer Services Editor'. Below this, there's a description: 'Use this editor to enter a new Customer Services reference or amend an existing one.' The main area contains a form with fields for 'Customer Service Reference' (containing 'CSR00007'), 'Status' (set to 'The CS Event is Active'), and 'Originating Source' (set to 'Telephone'). There are 'New' and 'Reopen' buttons. Below the form is a tabbed interface with tabs for 'General', 'Sales Orders \*', 'Misc Refunds', 'Products \*', 'Stores', 'Accounts \*', 'Notes \*', 'Correspondence \*', 'Tasks', 'Time Tracking', and 'History'. The 'Time Tracking' tab is selected, showing a clock icon and a table of activity breakdown. The table has columns for 'Start', 'End', 'Operator', and 'Activity'. The activities listed include 'Complete Service Reference CSR00007', 'General data changed', and several 'Complete Task' and 'Execute Task' entries related to goods received letters and email couriers. Below the table, it shows 'Total Time' as '00:05:27' and a filter set to 'All Users'. At the bottom, there are buttons for 'Add to Favourites', 'Print', 'Knowledge', 'OK', 'Cancel', and 'Apply'.

Start	End	Operator	Activity
22 May 11, 17:47:36	22 May 11, 17:47:41	PRIAM	Complete Service Reference CSR00007
22 May 11, 17:47:23	22 May 11, 17:47:40	PRIAM	General data changed
22 May 11, 17:45:55	22 May 11, 17:46:01	PRIAM	Complete Task [CN00044] Goods have been received letter, Task Type: Letter
22 May 11, 17:45:15	22 May 11, 17:45:51	PRIAM	Execute Task [CN00044] Goods have been received letter, Task Type: Letter
22 May 11, 17:44:42	22 May 11, 17:45:09	PRIAM	Complete Task [CN00043] Email courier asking for POD, Task Type: Email
22 May 11, 17:44:18	22 May 11, 17:44:39	PRIAM	Execute Task [CN00043] Email courier asking for POD, Task Type: Email
22 May 11, 17:44:05	22 May 11, 17:44:13	PRIAM	Complete Task [CN00042] Goods Not Received Letter to customer, Task Type: Letter
22 May 11, 17:43:31	22 May 11, 17:44:02	PRIAM	Execute Task [CN00042] Goods Not Received Letter to customer, Task Type: Letter
22 May 11, 17:42:18	22 May 11, 17:42:33	PRIAM	Sales order Processing

The time tracker screen records:

- The date and time when an activity started
- The date and time when an activity ended
- The name of the operator
- What the activity was

# Automated Customer Services

## Triggers

Maintaining contact and responding to customer requests quickly and efficiently are the issues in today's customer service environment. Ensuring that the customer always receives a response, is both time consuming and difficult to achieve.

Call Centre Manager enables you to automate the processes that maintains and controls customer contact. Triggers allow tasks to be created depending on events that occur within the PRIAM ERP system. These are called triggering events.

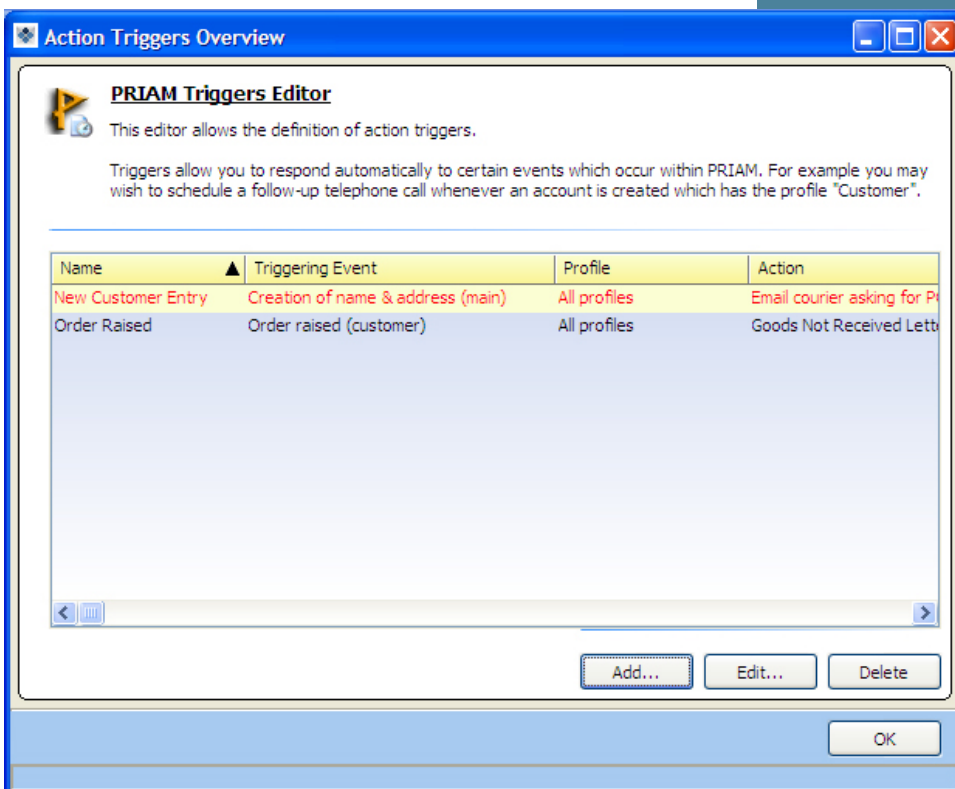
Examples of triggering events are the creation of a customer name and address record or the raising of a sales order.

A triggering event can initiate an action or series of actions. This could be a follow up call to a customer or a letter / email in response to a customer enquiry.

Actions are allocated as tasks to customer service agents or used to create (pre-defined) letters and emails. Tasks can be chained so that the telephone call can be followed by a letter or email.

Triggers can be applied to any transactional event within the PRIAM ERP system and can have many different uses. For example a trigger could be associated with a stock level falling below a pre-determined minimum level and actioning an email to be sent to an account manager or supplier.

Without a doubt this facility will be of enormous benefit to companies wishing to automate and control their business processes, particularly in a customer service environment.



# Automated Customer Services

## Automated Definable Actions (Tasks)

Call Centre Manager allows you to initiate activities or tasks. These tasks may involve sending a letter or email, or an agent calling the customer.

They may also involve a series of tasks where the completion of one task initiates a second or subsequent tasks e.g. the customer service letter followed up by a call back one week later, followed by an email in six months.

Call Centre Manager will automate and control all of these processes.

It allows users to:

- Define and diarize tasks
- Link tasks to actions and goals
- Automate task creation through triggers in the ERP system
- Chain tasks together so that depending on the result another task is initiated
- Require authorisation for certain tasks
- Escalate tasks that are not completed on time
- Associate profiles with results to automatically capture a record of the outcome

# Integrated Call Scripting

## CRMagic Browser Based Call Centre Scripting

Web enabled, telephony integrated with user definable scripting linked to an enterprise level multi-channel business system.

Updating prompts within Module, 'NADD1', for Script, 'PLACEORDER'

Use this form to edit the PROMPT TEXT and OPERATOR HELP TEXT for the selected Script/Module. Select a prompt and use the 'Edit Text' button to edit the associated PROMPT TEXT and OPERATOR HELP TEXT.

**Selected Module**

Script: Script for placing a standard Order (PLACEORDER)

Module: Name and Address Entry (NADD1)

Module Description: This module accepts name and postcode information

**Module prompts**

Prompts

- Ask if they are an existing customer (CRMNAME)
- Ask the client if they are an existing customer
- Please identify if the client is an existing or a new customer
- Ask for customer search information (CSEARCH)
- Can I take either your surname or your postcode
- You can search by either surname or postcode
- Ask customer to choose from selection (CSRCSSEL)
- Ask customer to confirm the address details.
- You can return to the search page or add new customer details. Click on the
- Edit the customers details (EDITDET)
- (No prompt text specified)
- (No operator text specified)
- Ask for customer number (OLDCUST)
- Ask for the customer number and click OK else click 'search'.
- If they don't know their customer number you can search by their name or .
- Display the postcode matches (PCDUPLICATE)
- (No prompt text specified)
- (No operator text specified)

Toggle prompt text preview

**Prompt Text Editor**

Use this form to edit the PROMPT TEXT and OPERATOR HELP TEXT for the selected prompt.

Prompt: Ask if they are an existing customer (CRMNAME)

Prompt Text: Ask the client if they are an existing customer

Operator Help Text: Please identify if the client is an existing or a new customer

OK Cancel

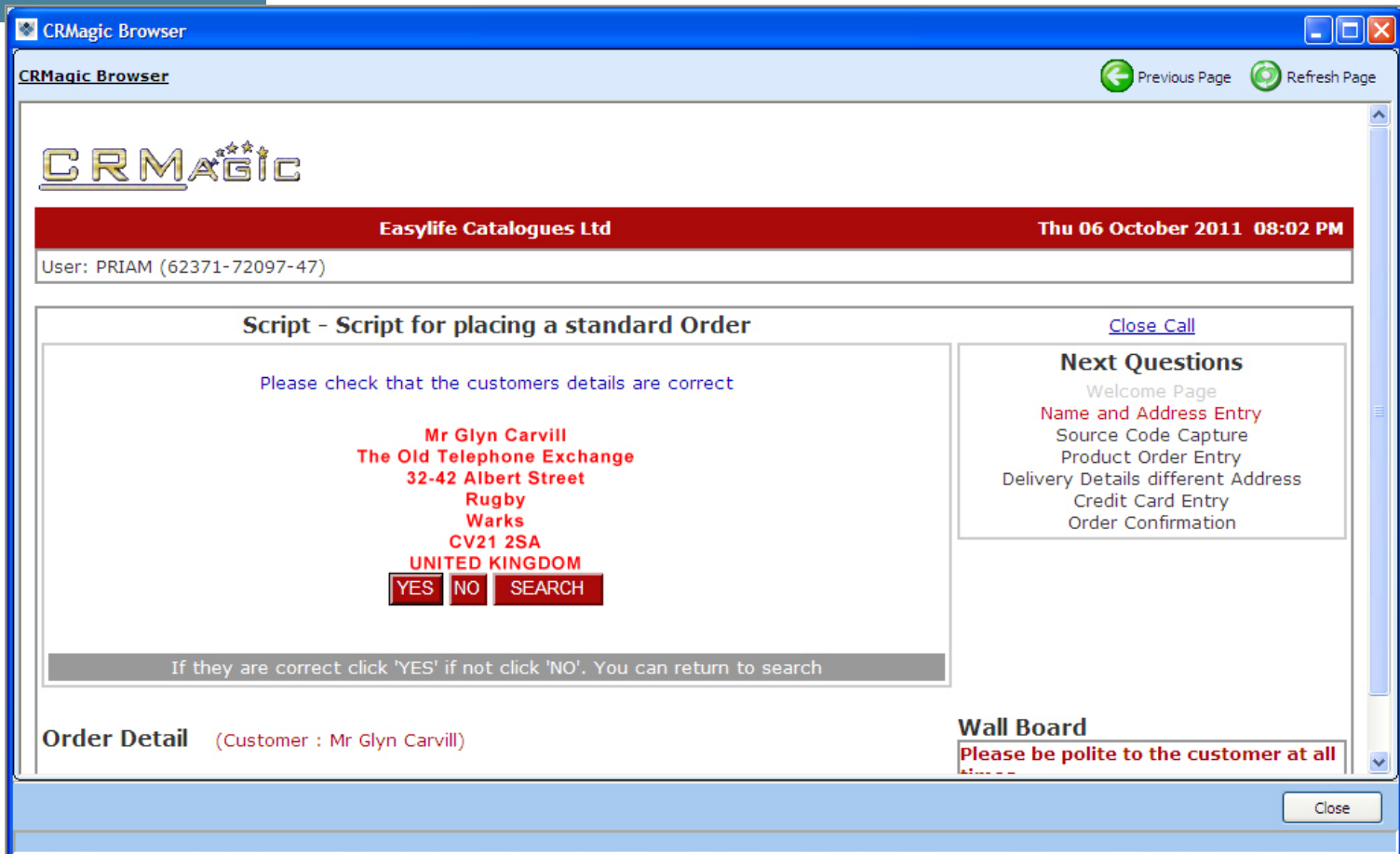
Edit Text

OK Cancel Apply

- Define operator scripts, prompts and help messages that guide the operator through the process
- Create scripts for inbound and outbound campaigns or data capture
- Incorporate images, graphics, hyperlinks and web content
- Ensure complete quality control of response by your operators
- Simple intuitive interface - make rapid changes to your existing campaigns quickly and easily

# Integrated Call Scripting

## CRMagic Browser Based Call Centre Scripting



The screenshot displays the CRMagic Browser interface. At the top, the browser title is "CRMagic Browser". The page header includes the CRMagic logo, the company name "Easylife Catalogues Ltd", and the date/time "Thu 06 October 2011 08:02 PM". The user is identified as "User: PRIAM (62371-72097-47)".

The main content area is titled "Script - Script for placing a standard Order" and includes a "Close Call" link. The script text reads: "Please check that the customers details are correct". The customer details are: "Mr Glyn Carvill", "The Old Telephone Exchange", "32-42 Albert Street", "Rugby", "Warks", "CV21 2SA", "UNITED KINGDOM". Below this, there are three buttons: "YES", "NO", and "SEARCH". A grey bar at the bottom of the script area contains the instruction: "If they are correct click 'YES' if not click 'NO'. You can return to search".

On the right side, there is a "Next Questions" section with a list of options: "Welcome Page", "Name and Address Entry", "Source Code Capture", "Product Order Entry", "Delivery Details different Address", "Credit Card Entry", and "Order Confirmation".

At the bottom left, there is an "Order Detail" section showing "(Customer : Mr Glyn Carvill)". At the bottom right, there is a "Wall Board" section with the text "Please be polite to the customer at all times". A "Close" button is located at the bottom right of the browser window.

- Allows you to wrap a script around the ordering taking process
- Integrates with your telephone system to automate the process of in-bound call handling
- Automatically launch scripts via CTI
- Links seamlessly to the full PRIAM Business system for picking, distribution and accounting
- Use the powerful profiling functionality to record customer responses and reactions

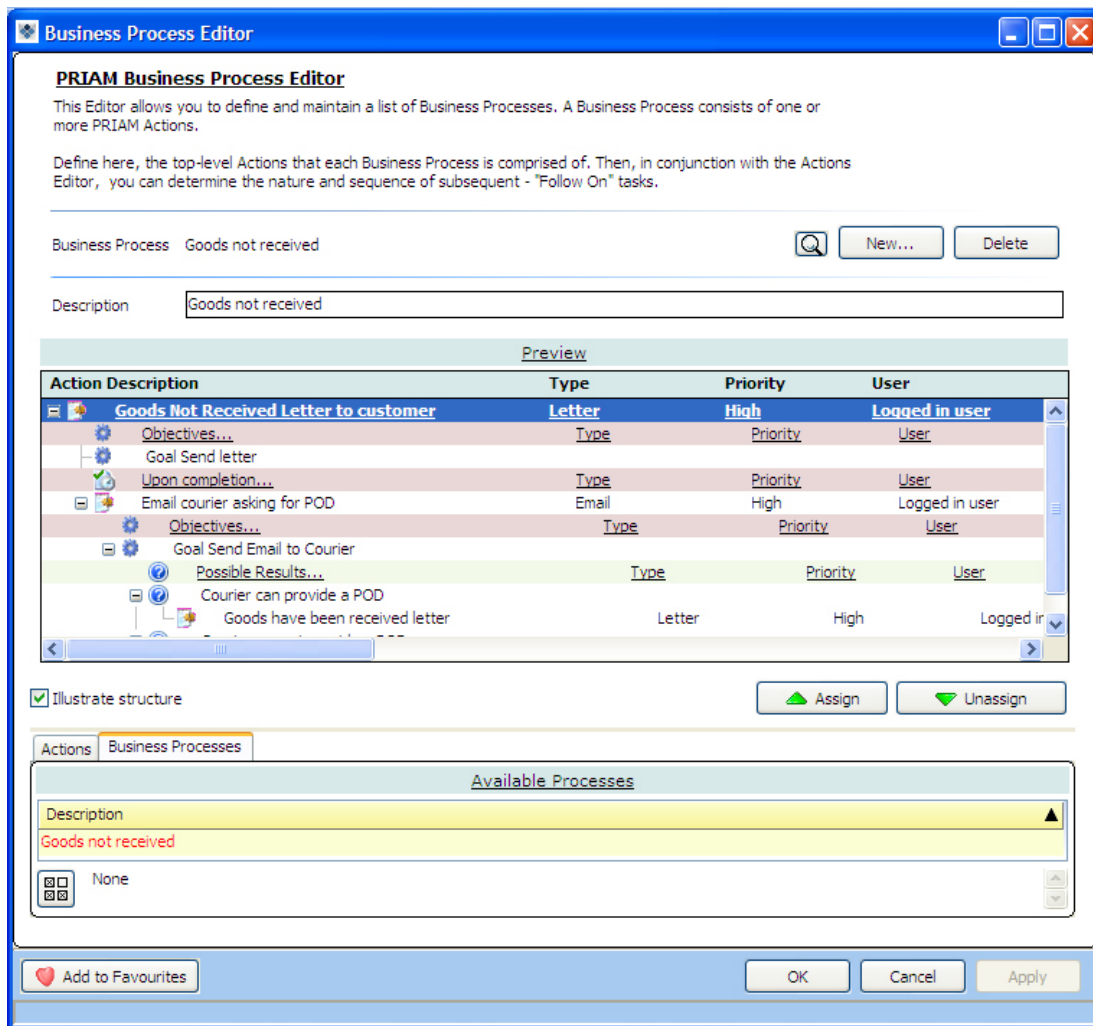


# Workflow Management

## Business Process Mapping / Workflow Management

The Business Process Editor allows you to automate your business processes within a powerful workflow management tool.

Create workflow templates that can then be activated to create a series of tasks that can be combined into a business processes.



- Each task is completed in the order of priority and when the task is due for completion
- Tasks may be allocated to individuals or groups
- Tasks may require authorisation and can be escalated to a supervisor or manager
- Other business processes can be added to the workflow template

# PRIAM Software

## Demonstrations:

To book a demonstration, please contact our main office.

Demonstrations can be held at our offices in Rugby, Warwickshire and are on an individual basis.

## Contact Details:



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32-42 Albert St  
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**MULTI-CHANNEL  
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